Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide

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Welfare Data Tracking Implementation Project

System Functionality

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Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide

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Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide

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Introduction

You are about to participate in an instructor-led training session designed specifically for users of the system as designed during the Welfare Data Tracking Implementation Project. This session has been designed to provide you with an opportunity to receive in-depth training of the WDTIP system and allow you to practice using the system through a number of hands-on exercises included in this training curriculum. The session will consist of a description of the elements of the system followed by a step-by-step group exercise then an exercise designed to be completed individually by each user.

This training curriculum is divided into three sections:

1. **The WDTIP System** – This section provides "the what" of the WDTIP system. It details the system background, system access, screen standards and navigation methods and provides the user with an in-depth understanding of how the system was designed and how to navigate through the different screens.

2. **WDTIP Processes** – This section provides "the how" of the WDTIP system. It contains a detailed review of all inquiry and update screens in the system with step-by-step instructions of how to perform specific functions within the system.

3. **WDTIP Reports** – The section provides an overview of the report data that will be generated by the WDTIP system as well as identification of potential utilization of the reported data.

Training Objectives

The system functionality training module has been developed to meet two sets of objectives: knowledge and performance. These objectives will be met utilizing stand up lecture materials, hands-on instructor led group exercises and individual based exercises.

The knowledge (conceptual) objectives outline the specific WDTIP system concepts and features that county trainers will understand at the completion of the training. At the completion of training, county trainers will be able to:

❑ Identify the background, features and functionality of the WDTIP system
❑ Understand the basic layout and screen standards of the WDTIP system
❑ Describe how menus, function keys, and system queues are used to navigate the WDTIP system

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide

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The performance (skill-based) objectives outline the tasks that county trainers will perform. At the completion of training, county trainers will be able to:

❑ Navigate through the 20 screens within the WDTIP system
❑ Understand the purpose of the 16 inquiry screens and four update screens as well as the data that is presented on each of the screens
❑ Understand and demonstrate the functionality of the four update screens and how to add, modify or delete records on these screens

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

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Section 1 – The WDTIP System

Background

In response to the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996, the State of California passed Assembly Bill (AB) 1542. AB-1542 institutes the Temporary Aid to Needy Families (TANF) program in California and imposes welfare time limits, as well as new programmatic and eligibility rules. In addition to welfare time limits, AB-1542 mandates work requirements through the California Work Opportunity and Responsibility to Kids (CalWORKs) program. As a result of the CalWORKs program, county welfare departments are required to have a mechanism to track eligibility time limits, and other related data on an individual level, across counties and over time to comply with the tracking requirements of both State and Federal mandates.

The purpose of the Welfare Data Tracking Implementation Project (WDTIP) is to provide counties with a tracking mechanism and a central data repository (the WDTIP system) that can be accessed by all counties. The WDTIP system will collect and track all data necessary to accurately calculate time-on-aid clocks as mandated by State and Federal welfare reform. Data to be collected from county welfare systems includes program participation information, individual exception and exemption information, diversion payment information as well as related demographic and identifier information. The WDTIP system will calculate and track the TANF 60-month clock, the CalWORKs 60-month clock and the Welfare to Work 18/24-month clock and display results on 16 inquiry (read-only) screens. The majority of the information that will be stored in the WDTIP database will be sent from the county/consortia eligibility systems via a standard file interface. This standard file will be sent from the counties or associated consortia on a daily basis with the contained information applied against the existing database files in a batch process that will execute nightly.

The WDTIP system will also provide on-line update capability for time clock related data that may not be stored in all county eligibility systems. Four screens have been developed to allow the on-line input of information related to Diversion Assistance, Non California Program Participation, Supportive Services Only Payments and Child Support Reimbursements.

In addition to screens that provide access to information, the WDTIP system will provide a series of reports to all the counties in electronic format. The system will generate electronic data files each month that delineate those individuals who are approaching or exceeding the designated time limits. These data files can be used by counties to develop reports that may assist workers with caseload management as it relates to time-on-aid tracking

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Training Curriculum – System Functionality
Participant Guide – Section 1

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Glossary of Terms

AID CODE	A code that indicates what specific program and type of benefit an individual is receiving.
BATCH	This processing involves receiving the standard update files from each county on a daily basis and applying them against the existing database files. This process is usually run after working hours.
CHARACTER	A letter, number or symbol that appears or is entered into a field on the screen.
CIN	Client Identification Number. A number assigned to an individual by the California Department of Health Services. This number is the unique identifier used by the Statewide Client Index as well as the WDTIP system.
COUNTY ID	The number an individual is associated with within a county, (includes county number, serial number, FBU, person number and aid code).
CURSOR	A highlighted square or flashing underscore that identifies the present position or location on a screen.
DATA	The information which is entered or displayed on a screen.
DATABASE	Files that reside in the system which contain all WDTIP time-on-aid tracking information.
ENTER	The key used to transmit data from a screen to the database.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

HHSDC
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ERROR MESSAGE	A message that is displayed on-line in the bottom portion of the screen that indicates an entry error has occurred and needs to be corrected.
EXCEPTION	A term used to indicate when an individual meets criteria that has been excepted from the normal time clock calculation. These include penalties, sanctions, exemptions and good cause determinations.
EXEMPTION	A term used for CalWORKs to indicate when an individual meets criteria that stops the time clock. Exempt months are not counted toward the total months on aid limit, therefore do not affect the time clock.
FIELD	Specific points on the screen where data is either entered or viewed.
FIELD HELP	Provides detailed information relating to a specific field on a screen. To access, place the cursor on the field and press [F1].
FILE CLEARANCE	The process of searching the Statewide Client Index (SCI) to determine if an individual is known to the database. Each individual known to SCI is assigned a separate unique Client Identification Number (CIN).
FUNCTION KEY	A specialized key located at the top of the keyboard that performs a specific action when it is pressed. Function keys are used in the WDTIP system to aid in navigation.
HELP DESK	A resource that is available to users to assist with questions that cannot be answered by resource materials or on-line help.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

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HELP SCREEN	A screen accessed by the user that provides detailed information pertaining to the screen or field that is requested.
HOME	The cursor position located in the first space of the first input field on the screen.
IDENTIFIER	A type of number an individual is known by, e.g. SSN, CIN, County ID.
INFORMATION MESSAGE	A message that is displayed on-line in the bottom portion of the screen that indicates an action has occurred or asks a user if they want to take an action.
INQUIRY SCREEN	A screen which allows a user to view information but not change it.
LOGGING ON	An operation performed to gain access to WDTIP.
LOGGING OFF	The procedure for exiting WDTIP.
MAIN MENU	The first screen in the WDTIP system that provides access to the inquiry and update screens in the system.
MEDS	Medi-Cal Eligibility Data System. Access to the WDTIP system is provided through MEDS.
MEDS ID	A number associated with an individual in MEDS. Usually the SSN or PSUEDO number.
PSEUDO	A number assigned by MEDS to an individual who does not have a SSN or is receiving sensitive services.
SCI	Statewide Client Index

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

HHSDC
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SCREEN BODY	Information displayed in the middle of the screen.
SCREEN FOOTER	Information displayed at the bottom of the screen.
SCREEN HEADER	Information displayed at the top of the screen.
SCREEN ID	The four-character name for each screen. This is displayed in the top left corner of the screen.
SCROLL SCREEN	A screen that contains more information than can be displayed within the space of the screen. Additional information can be accessed utilizing the function keys [F7] and [F8] allow the user to scroll up and down.
SEL	This identifies a selection field on a screen. When the cursor is placed in the SEL field and [Enter] is pressed, the user is taken to the requested screen.
SOUNDEX	A process used by SCI a search is conducted using a name only. The soundex process assign points to phonetically matching sounds and then returns those names with the highest point values. Also referred to as a "fuzzy" name search.
STANDARD FILE	A file received from county or consortia systems that contains a standard set of data elements. A majority of the time clock information that will be stored in the WDTIP system will be sent through the standard file process.
SUFX	Abbreviation for suffix e.g., Sr., Jr., III.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

HHSDC
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WDTIP	Welfare Data Tracking Implementation Project tasked with design, development and implementation of the WDTIP system.
WDTIP PRODUCTION REGION	The region of the WDTIP system that contains actual client demographic and welfare program information. This information will be used by the WDTIP system to calculate and track the Federal and State time clocks and will be updated via county specific transactions.
WDTIP TRAINING REGION	A region in the WDTIP system that mirrors the functionality of the production region but contains mock client demographic and program data. This region will be used during the WDTIP system training sessions.

Acronyms

The following is a list of commonly used acronyms within this document.

Acronym	Phrase/Name
AB	Assembly Bill
ACL	All County Letter
CalWORKs	California Work Opportunity and Responsibility to Kids
CIN	Client Identification Number
DOB	Date of Birth
FBU	Family Budget Unit
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MEDS	Medi-Cal Eligibility Data System
PRWORA	Personal Responsibility and Work Opportunity Reconciliation Act
SAWS	Statewide Automated Welfare System
SAWS-TA	SAWS – Technical Architecture
SCI	Statewide Client Index
SIS	SAWS Information System
SSN	Social Security Number
TANF	Temporary Assistance for Needy Families
WDTIP	Welfare Data Tracking Implementation Project
WTW	Welfare to Work

Logging On

Users will access WDTIP through MEDS. There are two ways to access the WDTIP system via the MEDS.

Option 1:
1. Logon to MEDS using your normal MEDS sign-on.
2. On the blank MEDS screen type "TRAC" and press the [Enter] key to enter the WDTIP production region or "TRAT" to enter the WDTIP training region.
3. This action will take the user to the TRAC Main Menu.

Option 2: *(Note: This option is not available until after system go-live scheduled to occur on 6/5/00)*
1. Logon to MEDS using your normal MEDS sign-on.
2. On the blank MEDS screen the user can type "MENU" and press the [Enter] key.
3. The MEDS Inquiry Request Menu will display at which time the user can select option "Y" to enter the WDTIP production region or "Z" to enter the WDTIP training region.

See MEDS Inquiry Request Menu below:

```
MENU                 ** INQUIRY REQUEST MENU **


    OPTION  ?
    (PF12)   R = INQR - MEDS RECIPIENT INQUIRY BY ID NUMBER
    (PF22)   N = INQN - MEDS RECIPIENT INQUIRY BY NAME
             C = INCI - HEALTH SERVICES STATEWIDE CLIENT INDEX INQUIRY
    (PF23)   W = INQW - MEDS CASE MEMBER INQUIRY
    (PF21)   X = INXR - MEDS CROSS REFERENCE FILE INQUIRY
             S = SOCR - SHARE OF COST SPENDDOWN CASE MEMBERS/STATUS
             P =      - MEDS IMMEDIATE NEED ELIGIBLE RECORD (FUTURE)
             T = INXT - MEDS IMMEDIATE NEED COUNTY ID CROSS REFERENCE

    (PF20)   A = INWA - MEDS WORKER ALERTS
             H = HOLD - MEDS WORKER ALERTS FOR "HOLD" RECORDS
    (PF19)   I = IEVS - INCOME/ELIGIBILITY VERIFICATION SYSTEM MENU
             O = HOME - HOMELESS ASSISTANCE PROGRAM MENU
             V = HIAR - HEALTH INSURANCE SYSTEM MENU
             G =      - CCS/GHPP INQUIRY MENU
             Y = TRAC - TRAC INFORMATION SYSTEM MAIN MENU (PRODUCTION)
             Z = TRAT - TRAC INFORMATION SYSTEM MAIN MENU (TRAINING)
             M = MOPI - PROVIDER ELIGIBILITY VERIFICATION RESPONSE (POS)

    FOR DETAILED EXPLANATIONS OF THE INQUIRY OPTIONS LISTED PRESS PF13
```

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

HHSDC
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Logging Off

Notes

Users log off the WDTIP system by logging off of MEDS utilizing their normal MEDS log off protocol.

Note:

After WDTIP system "go-live", the WDTIP production region will be populated with actual client demographic and welfare program data. This information will be used by the WDTIP system to calculate and track the Federal and State time clocks. These time clocks will be updated via county specific transactions.

The WDTIP training region, which will be utilized during this training session, is a region of the system that mirrors the functionality of the production region but contains mock client demographic and program data.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

HHSDC
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System Access (Security)

The WDTIP system will be accessed via the MEDS Inquiry Request Menu with system access controlled through MEDS security protocol. Users will log on to MEDS using their regular MEDS user ID and password. Access to the WDTIP production or training regions are options from the MEDS Inquiry Request Menu.

Users who have access to MEDS will have access to WDTIP. Users who have inquiry access in MEDS will have inquiry or "read-only" access to all screens in the WDTIP system. Only those users with update access in MEDS will have on-line update capabilities in the WDTIP system. MEDS will perform the security check allowing users update access. On-line update capability refers to the ability to enter and/or update information directly into the WDTIP system via the four updateable screens. Updates to information other than that captured on the four update screens will be through the standard batch file process.

The WDTIP system will provide security for on-line record modifications, additions and deletions. Authorized users of the WDTIP on-line update transactions may only update data that is owned by their respective county. A county must be the "county of record" to update information contained in that record.

All counties will have inquiry access to all screens in WDTIP. Update access to the four updateable screens is limited to those counties who are unable to send the required information through their eligibility system. Counties will only use the update screens to send information to the WDTIP system when they cannot send the information through the standard file process. This occurs if the county does not track the required information in their eligibility system. For example, many of the current eligibility systems do not capture and/or track diversion payment information. The information needed by the WDTIP system to accurately calculate and track the timeclocks, as pertaining to the diversion payment will be entered by the county utilizing the appropriate update screen.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

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Navigation

Navigation in WDTIP has been designed to be user-friendly, logical and based on the user's knowledge of the system. There are multiple ways to navigate through the screens in the system.

Cursor Movement

Notes

| Home | The Home Key moves the cursor to the first editable field on the screen |

| Enter | The Enter Key transmits data from the screen to the WDTIP database |

Arrow keys move the cursor one space at a time in the direction of the arrow

| Tab | The Tab key moves the cursor to the next field on the screen |

| Space Bar | The Space Bar moves the cursor one space forward and blanks out any characters that were entered in the field |

Screen ID's

Each of the 20 screens in the WDTIP system has a four-character short name or Screen ID that displays in the upper left-hand corner of the screen. The naming of the Screen ID's follows a specific convention intended to make them easy to understand and remember. The first letter of the Screen ID is the first letter of the first word of the long screen name. The next three letters are an abbreviation for the remainder of the screen name. For example, the Screen ID for the Time Clock Summary Screen is TSUM. On most screens in the WDTIP system a user can move from one screen to another by simply typing the Screen ID of the screen they wish to move to in the Screen ID field. Pressing [Enter] will take the user to the requested screen. Screens that have an editable Screen ID field will display the Screen ID in green type.

The F4 key can be utilized to bring up a list of screens and their associated Screen IDs. A user can move to another screen by selecting the appropriate Screen ID from those listed when the F4 key is pressed. The user selects the screen by placing the cursor next to the Screen ID and pressing the [Enter] Key. The system will take the user directly to the selected screen.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

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Function Keys

Function keys are keys that perform specialized functions in the WDTIP system. Function keys that can be utilized on a screen are listed at the bottom of the screen with a brief description of their specific function. A description of the function keys and their specific function is provided in the table below:

Function Key	Display	Function
F1	HELP	Used to access Screen and/or Field Help. Displays the functionality of each screen as well as describes in detail each data field on the screen. Screen Help is available on all screens in WDTIP. Field Help is available on all update screens.
F2	IINQ	Displays the Individual Inquiry Screen.
F3	PREV	Returns user to the previous screen. Available on all screens in WDTIP.
F4	SCRN	Lists all the screen names with Screen-ID's. User moves to the screen they want by placing the cursor next to the Screen ID and pressing the enter key.
F5	PREC	Takes the user to the previous record displayed on the screen.
F6	NREC	Takes the user to the next record displayed on the screen.
F7	UP	When more than one page of data is available on a screen, [F7] will scroll the page up. Available on all summary screens.
F8	DOWN	When more than one page of data is available on a screen, [F8] will scroll the page down. Available on all summary screens.
F9	IDET	Displays the Individual Detail Screen. Available on all screens with the exception of IDET.
F9	NXTSCRN	Displays from IDET only. Takes user to screen requested from the Main Menu.
F10	TSUM	Displays the Time Clocks Summary Screen.
F11	MEDS	Displays the MEDS MENU.
F12	TRAC	Displays the TRAC MAIN MENU.

General Screen Flow

The general screen flow is described in the following steps:

1. The user accesses WDTIP from the MEDS Inquiry Request Menu.
2. From the TRAC Main Menu, the user enters the number of the screen they wish to access.
3. Once a selection is made the Individual Inquiry Screen appears where the user enters search criteria for an individual.
4. The Individual Response Summary Screen is then displayed with the results of the search.
5. The user then selects the record of the individual by placing the cursor next to the individual record they wish to select and pressing [Enter]. The screen that was selected at the TRAC Main Menu is displayed with the selected individual's information.
6. If the user wishes to see more detailed information before going to the selected screen, they may press [F9] to display the Individual Detail Screen.
7. If they choose [F9] and decide the individual selected is correct, they press [F9] again to see the originally selected screen.
8. If it is not the correct individual, the user can press [F3] to return to the previous screen (Individual Response Summary) to select another individual.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

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The general screen flow is depicted in the following figure:

Figure 1: General Screen Flow

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Training Curriculum – System Functionality
Participant Guide – Section 1

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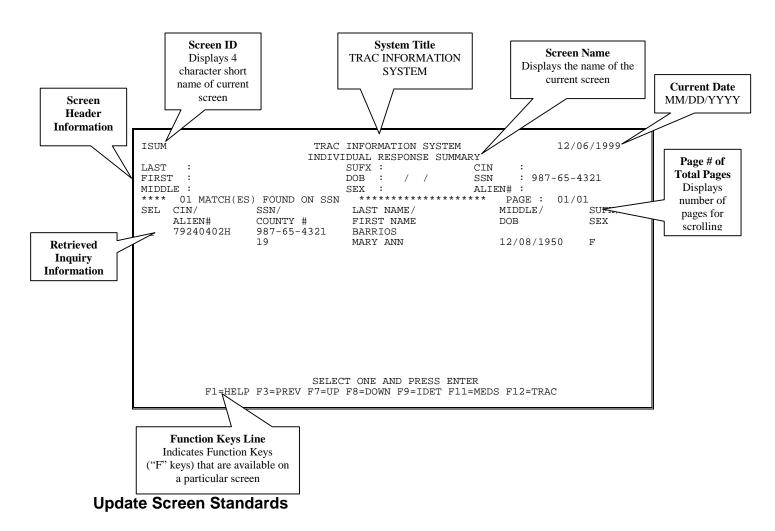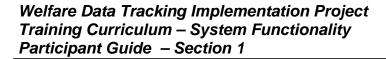Services Agency Data Center

Screen Standards

The WDTIP system will consist of 20 screens, 16 of which are inquiry only screens and 4 are on-line updateable screens. Information on these screens will display as follows:

Enterable fields will be displayed in **green**
Field names will be displayed in **blue**
Retrieved output only data will be displayed in white
Error and Informational Messages will be displayed in white

Inquiry Screen Standards

There are currently 16 inquiry or "read-only" screens that will display all captured and calculated time clock related data. All WDTIP inquiry screens will display certain standard information. The diagram below outlines these standards.

Screen ID
Displays 4 character short name of current screen

System Title
TRAC INFORMATION SYSTEM

Screen Name
Displays the name of the current screen

Current Date
MM/DD/YYYY

Screen Header Information

Page # of Total Pages
Displays number of pages for scrolling

Retrieved Inquiry Information

```
ISUM                     TRAC INFORMATION SYSTEM              12/06/1999
                         INDIVIDUAL RESPONSE SUMMARY
LAST   :                      SUFX :             CIN   :
FIRST  :                      DOB  :   /  /      SSN   : 987-65-4321
MIDDLE :                      SEX  :             ALIEN# :
****  01 MATCH(ES) FOUND ON SSN   ******************** PAGE :  01/01
SEL CIN/          SSN/          LAST NAME/         MIDDLE/        SUFX
    ALIEN#        COUNTY #       FIRST NAME         DOB           SEX
    79240402H     987-65-4321    BARRIOS
                  19             MARY ANN           12/08/1950    F




                         SELECT ONE AND PRESS ENTER
          F1=HELP F3=PREV F7=UP F8=DOWN F9=IDET F11=MEDS F12=TRAC
```

Function Keys Line
Indicates Function Keys ("F" keys) that are available on a particular screen

Update Screen Standards

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There are currently four updateable screens in WDTIP. All WDTIP update screens follow
the same input protocol and will contain certain standard information. The diagram below
outlines these standards.

Screen ID
Displays four
character short
name of current
screen

System Title
TRAC INFORMATION
SYSTEM

Screen Name
Displays the name of the
current screen

Current Date
MM/DD/YYYY

**Screen
Header
Information**

**Modify or Delete
Selection Indicator**
Used to indicate if
the user wants to
modify or delete a
record

**Add Record
Selection Indicator**
Used to indicate the
user wants to add a
new record

NOTE:
The Modify,
Delete and Add
Record Indicators
are open fields
only to users with
update capability
in TRAC

**Page # of
Total Pages**
Displays
number of
pages for
scrolling

```
                         TRAC INFORMATION SYSTEM                    12/06/1999
                            DIVERSION UPDATE

LAST   : AGUIRRE                      SUFX :            CIN   : 70001660F
FIRST  : LUPE                         DOB  : 12/23/1968 SSN   : 593-27-3318
MIDDLE :                              SEX  : F          ALIEN# :

SELECT A RECORD TO MODIFY OR DELETE (M/D):
SEL CNTY AID PAYMENT DATE      AMOUNT          RSN 4-MO START       END        COND
    #    CD                                        IND MONTH       MONTH
 _   01  3K  11 / 11 / 1999  10 , 000 . 00    020  N   11 / 1999  12 / 1999    D
 _   50  03  02 / 04 / 1999   5 , 000 . 00    020  N   01 / 1999  02 / 1999    D
 _   50  03  02 / 03 / 1999   9 , 999 . 99    020  N   01 / 1999  02 / 1999    D


***************************************************************************
ADD A NEW RECORD (A):
SEL CNTY AID PAYMENT DATE      AMOUNT          RSN 4-MO START       END        COND
    #    CD                                        IND MONTH       MONTH
 _       __  __ / __ / ____  __ , ___ . __    ___  _   __ / ____  __ / ____    D

    ADD/MODIFY/DELETE RECORD (Y/N)?  _                          PAGE:  01/01

   F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

Error/Message Line
Displays when a
record is modified
deleted or added or a
data input error has
occurred

Function Keys Line
Indicates Function Keys
"F" keys that are available
on a particular screen

Screen/Field Help Standards

Screen Help provides a general description of the functionality of each screen and is available on all screens in WDTIP. Placing the cursor in the Screen ID field or any field label on a screen and pressing [F1] accesses Screen Help. To exit Screen Help, press [F3] and the user will be returned to the screen they were on.

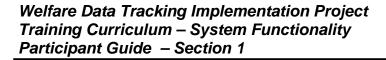A sample of screen help is provided below:

```
SHLP                    TRAC INFORMATION SYSTEM
                             SCREEN HELP

THE INDIVIDUAL RESPONSE SUMMARY SCREEN DISPLAYS THE RESULTS
OF AN INDIVIDUAL INQUIRY IF THE SYSTEM FINDS ONE OR MULTIPLE RESPONSES
FOR THE SEARCH CRITERIA.

SEL: RECORD SELECTOR
CIN: CLIENT INDEX NUMBER
ALIEN #: IMMIGRATION NATIONALIZATION SERVICE NUMBER
SSN: INDIVIDUAL'S SOCIAL SECURITY NUMBER
COUNTY #: 2 CHARACTER COUNTY ID
LAST: LAST NAME
FIRST: FIRST NAME
MIDDLE: MIDDLE NAME OR INITIAL
DOB: BIRTH DATE
SUFX: SUFFIX
SEX: GENDER



                  F3=PREV F7=UP F8=DOWN          PAGE:  01/01
```

Field level help is available on the four update screens in WDTIP and the Individual Inquiry Screen (IINQ). Field Help provides information relating to a specific field on a screen. Placing the cursor in the specific editable field and pressing [F1] accesses Field Help. A small pop up window appears in the upper left-hand corner of the screen and provides information specific to the selected field will be displayed. To exit Field Help, press [F3] and the user will be returned to the screen they were on.

A sample of Field Help for the Diversion Reason code on the Diversion Update Screen is provided below:

```
************************************************
*               REASON                         *
*                                              *
* REASON FOR DIVERSION PAYMENT                 *
* (E.G., CHILD CARE, TRANSPORTATION)           *
*                                              *
*                                              *
*                                              *
*               PF3=PREV                        *
************************************************
```

Error and Information Messages

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

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Error and/or informational messages will be displayed on the lower left portion of a screen when an input error has occurred or action has been taken. These messages will display in white text and will include a brief message describing the error or action that has occurred.

A sample of an Error Message on the Individual Inquiry Screen (IINQ) for an invalid SSN is highlighted below:

```
IINQ                    TRAC INFORMATION SYSTEM              MM/DD/YYYY
                          INDIVIDUAL INQUIRY

SEARCH CRITERIA - ENTER 1 OR MORE
SSN      : A25 - 63 - 5789
CIN      : _____
ALIEN #  : A _____
COUNTY ID : __ - __ - _____ - _ - __  (COUNTY #/AID/SERIAL #/FBU/PRSN #)

          *************OR*************

SEARCH CRITERIA - ENTER FIELDS
            LAST*                FIRST         MIDDLE       SUFX
NAME: _____   _____  _____    ___

         SPECIFIC        -OR-        RANGE
DOB:   __ / __ / ____               FROM :  __ / __ / ____
                                    TO   :  __ / __ / ____
SEX:   _
 *MANDATORY

               ENTER SEARCH CRITERIA AND PRESS ENTER
 1610 - INVALID SSN. SHOULD BE NUMERIC.
                    F1=HELP F11=MEDS F12=TRAC
```

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

HHSDC
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Screen Dependencies

Some of the screens in the WDTIP are dependent on data being entered on or present on a previous screen. In order to access a dependent screen data must be entered or be present on the primary screen. For example, in order to access the Exception Detail Screen, there must be at least one data record on the Exception Summary Screen.

The inquiry screen dependencies are depicted in the following figure:

Figure 2: Inquiry Screen Dependencies

Primary Screen	Dependent Screen	Dependent Screen
Individual Inquiry (IINQ)	→ Individual Response Summary (ISUM)	→ Individual Detail (IDET)

Primary Screen	Dependent Screen	Dependent Screen
County Summary (KSUM)	→ Program Summary (PSUM)	→ Program Detail (PDET)

Primary Screen	Dependent Screen
Diversion Summary (DSUM)	→ Diversion Detail (DDET)

Primary Screen	Dependent Screen
Exception Summary (ESUM)	→ Exception Detail (EDET)

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 1

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Services Agency Data Center

The update screen dependencies are depicted in the following figure:

Figure 3: Update Screen Dependencies

Notes

Primary Screen	Dependent Screen	Dependent Screen
Diversion Update (UDIV)	→ Diversion Summary (DSUM)	→ Diversion Detail (DDET)

Primary Screen	Dependent Screen	Dependent Screen
Child Support Reimbursement Update (UCSR)	→ Exception Summary (ESUM)	→ Exception Detail (EDET)

Primary Screen	Dependent Screen	Dependent Screen
Supportive Services Update (USSO)	→ Exception Summary (ESUM)	→ Exception Detail (EDET)

Primary Screen	
Non-California Participation (UNCP)	→ Data on the Non-California Participation Screen is used to calculate the TANF and CalWORKs timeclocks but does not populate any dependent screens.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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Services Agency Data Center

Section 2 – WDTIP Processes

Inquiry Screens Review

There are 16 inquiry or "read-only" screens in the WDTIP system that will display all captured and calculated time clock related data. These screens can be utilized to retrieve information regarding an individual's program participation, cumulative time clock status, diversion payments history, and/or exception history.

TRAC Main Menu (TRAC)

The TRAC Main Menu is the starting point for the WDTIP system and is displayed after selecting the WDTIP option from the MEDS Inquiry Request Menu or by typing "TRAC" or "TRAT" at a blank MEDS screen. The user will then select an option from this menu depending on what information they want to research or action they wish to take.

```
TRAC                        TRAC INFORMATION SYSTEM              MM/DD/YYYY
                                  MAIN MENU

    INQUIRY SCREEN NAME        ID        INQUIRY SCREEN NAME          ID
1.  INDIVIDUAL INQUIRY        IINQ   10. CAL 60-MONTH CALENDAR       KCAL
2.  INDIVIDUAL DETAIL         IDET   11. WTW 18/24-MONTH CALENDAR    WCAL
3.  ALTERNATE IDENTITY        ALID
4.  COUNTY SUMMARY            KSUM
5.  PROGRAM SUMMARY           PSUM        UPDATE SCREEN NAME           ID
6.  DIVERSION SUMMARY         DSUM   12. NON-CAL PARTICIPATION UPDATE UNCP
7.  EXCEPTIONS SUMMARY        ESUM   13. DIVERSION UPDATE            UDIV
8.  TIME CLOCKS SUMMARY       TSUM   14. CHILD SUPPORT REIMB. UPDATE UCSR
9.  TANF 60-MONTH CALENDAR    TCAL   15. SUPPORTIVE SERVICES UPDATE  USSO




              SELECT A SCREEN NUMBER AND PRESS ENTER : __




                      F1=HELP F3=PREV F11=MEDS
```

Individual Inquiry Screen (IINQ)

Selection of any option from the TRAC Main Menu will bring up the
Individual Inquiry Screen. This screen is used to perform a search
against the Statewide Client Index to obtain a list of individuals who
may match the selection criteria entered by the user. From this screen
the user may initiate one of two type of inquiries, an identifier search
or a name search.

```
IINQ                   TRAC INFORMATION SYSTEM               MM/DD/YYYY
                          INDIVIDUAL INQUIRY

SEARCH CRITERIA - ENTER 1 OR MORE
SSN       : ___ - __ - ____
CIN       : _____
ALIEN #   : A _____
COUNTY ID : __ - __ - _____ - _ - __  (COUNTY #/AID/SERIAL #/FBU/PRSN #)

           *************OR*************

SEARCH CRITERIA - ENTER FIELDS
                LAST*              FIRST         MIDDLE       SUFX
NAME: _____    _____    _____    ___

         SPECIFIC         -OR-         RANGE
DOB:  __ / __ / ____                FROM :  __ / __ / ____
                                    TO   :  __ / __ / ____
SEX:  _
 *MANDATORY

              ENTER SEARCH CRITERIA AND PRESS ENTER

                 F1=HELP F11=MEDS F12=TRAC
```

To conduct a search using an individual identifier, enter any one of the
unique identification numbers in the associated field. A single
identifier or a combination of identifiers can be used to perform a
search. If multiple identifiers are used in a search, the search will stop
after the first match on an entered identifier based on a pre-determined
hierarchy. The system will display all information associated with that
identifier on the following screen, Individual Response Summary
(ISUM). The hierarchy of the search is as follows: CIN, SSN, Alien
Number, County ID, and Name.

   SSN – enter the individual's nine digit Social Security Number or
   MEDS Pseudo Number
   CIN – enter the individual's nine digit Client Identification
   Number
   ALIEN # - enter the individual's alien number (if they have one)
   Note: The leading A is already pre-filled so you do not need to
   enter it again.
   COUNTY ID – this is the individual's case number including the
   county number, aid code, case serial number, the FBU and the
   person number. The aid code is optional

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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When [Enter] is pressed after entering an identifier, the system will conduct a search against the Statewide Client Index and display matches and/or potential matches on the following screen, Individual Response Summary (ISUM) up to a maximum of 25 records.

To conduct a search using an individual's name, the user will enter the following:

LAST – enter the individual's last name. This is a mandatory field when conducting a name search

FIRST – enter the individual's first name. Optional, enter if known

MIDDLE - enter the individual's middle name or initial. Optional, enter if known

SUFX – enter if individual uses a suffix name (Sr., Jr., III). Optional, enter if applicable

SEX – enter the individual's sex (Valid values for this field are M or F or U) Optional, enter if known

DOB – enter the individual's date of birth in the following format MM/DD/YYYY) Optional, enter if known.

DOB Range – enter a date range for the individual's date of birth if the exact date is not known. Optional, enter if exact birth date is not known

When [Enter] is pressed after entering known name information, a search will be conducted against the Statewide Client Index and display all matches and/or potential matches on the following screen, Individual Response Summary (ISUM). SCI utilizes a soundex system when performing a name search that assigns points to phonetically matching sounds and then returns those names with the highest total point value. A maximum of 25 potential matches will be returned on the Individual Response Summary screen.

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Notes

<u>**Hands On Exercise:**</u>

Practice #1:
Perform an identifier search using the SSN provided by the trainer.

    SSN: _____

1. From the TRAC Main Menu, select Individual Inquiry (IINQ) and press [Enter].
2. On IINQ, enter the individual's SSN in the SSN field and press [Enter].
3. The system will search the SCI database and display on the Individual Response Summary Screen (ISUM) all exact matches with the SSN entered.

Practice #2:
Perform an identifier search using the CIN provided by the trainer.

    CIN: _____

1. From the TRAC Main Menu, select Individual Inquiry (IINQ) and press [Enter].
2. On IINQ, enter the individual's CIN in the CIN field and press [Enter].
3. The system will search the SCI database and display on the Individual Response Summary Screen (ISUM) all exact matches with the CIN entered.

Practice #3:
Perform a name search using and date of birth provided by the trainer.

    Name: _____ **DOB:** _____

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Individual Response Summary (ISUM)

This screen displays the results of the search conducted on information entered on the Individual Inquiry Screen. A maximum of 25 records will be returned on any search criteria. From this list the user can select an individual to view further information about that individual. To view individual detail information, place the cursor in the "SEL" field for the individual you wish to view and press [F9], which displays the Individual Detail Screen (IDET). The user can then press [F9] from IDET to proceed to the screen selected from the TRAC Main Menu. If the user does not wish to view the IDET Screen, they press the [Enter] key after placing the cursor in the "SEL" field for the individual you wish to select, and the screen selected from the TRAC Main Menu will be displayed.

```
ISUM                    TRAC INFORMATION SYSTEM                MM/DD/YYYY
                      INDIVIDUAL RESPONSE SUMMARY
LAST   :                    SUFX :            CIN   :
FIRST  :                    DOB  :  /  /      SSN   : 123-45-6789
MIDDLE :                    SEX  :            ALIEN# :
****   01 MATCH(ES) FOUND ON SSN      ********************  PAGE:  01/01
SEL  CIN/         SSN/         LAST NAME/          MIDDLE/      SUFX/
     ALIEN#       COUNTY #     FIRST NAME          DOB          SEX
 _   90008580G    123-45-6789  SMYTHE
                  19           SAMMUEL             01/01/1960   F




                     SELECT ONE AND PRESS ENTER
          F1=HELP F3=PREV F7=UP F8=DOWN F9=IDET F11=MEDS F12=TRAC
```

The information reported on ISUM is the demographic information that is linked to an individual's CIN. Information displayed in the header section of the screen is the information used as the search criteria (the information entered by the user on the Individual Inquiry screen, IINQ).

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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The following table describes the fields on ISUM:

Field	Description
Header Information	Criteria used to perform the search will be displayed in the header of the screen. This is the search information from IINQ.
Response line	The number of matches found and how many pages of responses were returned will be displayed (Page 01/03).
SEL	This is the selection field. Place the cursor next to the individual's name and press [F9] for Individual Detail or [Enter] to go to the screen requested from the TRAC Main Menu.
CIN	Client Identification Number
SSN	Social Security Number
LAST, FIRST, MIDDLE, SUFX	The last, first and middle name (or initial) of the individual as well as a suffix if one is found.
ALIEN #	INS Alien number if the individual has one.
COUNTY #	The number of the county of record in SCI. This is the county that last updated the SCI record.
DOB	Date of Birth (MM/DD/YYYY format)
SEX	Gender (M = Male, F= Female, U = Unknown)

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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Hands On Exercise:

Practice #1:
Determine if named individual has any diversion history in the WDTIP system. Perform a name search using the name and date of birth provided by the trainer.

Name:_____ **DOB:** _____

1. From the TRAC Main Menu, select Diversion Summary (DSUM) and press [Enter].
2. On IINQ, enter the individual's last name, first name and middle name/initial in the respective fields and press [Enter].
3. The system will search the SCI database and display on the Individual Response Summary screen (ISUM) up to 25 matches and potential matches based on a soundex scoring criteria with the name entered.
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the first name displayed on the list and press [F9] to go to the Individual Detail screen.
5. Press the [F3] key to go back to ISUM.
6. Place the cursor in the "SEL" field next to the second name displayed on the list and press [Enter] to go to (DSUM) the screen requested from the TRAC Main Menu.

Practice #2:
Determine if individual has any exception history in the WDTIP system. Perform a search on SSN provided by the trainer.

SSN: _____

Notes

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Individual Detail (IDET)

Notes

This screen displays further information regarding an individual including indicators for time clocks, exceptions, and diversion payments.

```
IDET                    TRAC INFORMATION SYSTEM              MM/DD/YYYY
                            INDIVIDUAL DETAIL

LAST   : SMYTHE             SUFX :          CIN    : 90008085G
FIRST  : SAMMUEL            DOB  : 01/01/1960  SSN    : 123-45-6789
MIDDLE :                    SEX  : M          ALIEN# :

BIRTH COUNTRY        : US          TIMECLOCK INDICATOR
BIRTH STATE          : CA            A. TANF 60          : Y
ALTERNATE IDENTITY   : Y             B. CAL 60           : Y
LAST COUNTY OF RECORD : 19           C. NON-CAL MONTH    : Y
                                     D. WTW 18/24        : Y

                                   EXCEPTIONS INDICATOR
                                     A. SANCTIONS        :  N
                                     B. EXEMPTIONS       :  Y
                                     C. GOOD CAUSE       :  N

                                   DIVERSION INDICATOR   :  Y




   F1=HELP F2=IINQ F3=PREV F4=SCRN F9=NXTSCRN F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for IDET:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
BIRTH COUNTRY	Displays a code that indicates the birth country of the selected individual.
BIRTH STATE	Displays the abbreviation for the birth state of the selected individual.
ALTERNATE IDENTITY	Flag to indicate if selected client was know by other identifier information including alternate SSN, CIN, County ID, DOB, or name. If the flag is set to "Y", the user will then be able to access the Alternate Identity Screen (ALID).
LAST COUNTY OF RECORD	Displays a numeric code to indicate the most recent county the individual was involved with.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
California Health & Human
Services Agency Data Center

Notes

Field	Description
TIMECLOCK INDICATOR	Flags to designate that the designated time clock has been initialized, and if non-California months have been included on any of the time clocks. If the flag is set to "Y", then the corresponding time clock has been started or there are non-California months included in one or more of the time clocks. More detailed information is available on the Time Clock Summary screen (TSUM).
EXCEPTIONS INDICATOR	Flags to indicate if the individual has any sanction, exemption or good cause records in the WDTIP database. If the flag is set to "Y", then a corresponding record has been received. More information about the time clock exceptions is available on the Time Clock Exception Summary and Detail screens (ESUM and EDET).
DIVERSION INDICATOR	Flag to indicate if the individual has any diversion records in the WDTIP database. If the flag is set to "Y", then a diversion payment record exists in the database. More details are available on the Diversion Summary and Detail screens (DSUM and DDET).

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
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Services Agency Data Center

Notes

Hands On Exercise:

Practice #1:
Determine if named individual has any time clocks initialized in the WDTIP system. Perform a name search using the name and date of birth provided by the trainer.

> **Name:** _____ **DOB:** _____

1. From the TRAC Main Menu, select Individual Inquiry (IINQ) and press [Enter].
2. On IINQ, enter the individual's last name, first name and middle name/initial in the respective fields and press [Enter].
3. The system will search the SCI database and display on the Individual Response Summary screen (ISUM) up to 25 matches and potential matches based on a soundex scoring criteria with the name entered.
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the first name displayed on the list and press [F9] to go to the Individual Detail screen.
5. Determine if the selected individual has any time clocks initialized.

Practice #2:
Determine if named individual has any time clocks initialized in the WDTIP system. Perform a search on SSN provided by the trainer.

> **SSN:** _____

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Notes

Alternate Identity (ALID)

This screen displays alternate demographic information that exists for the selected individual, including additional names and/or identifier information.

```
ALID                    TRAC INFORMATION SYSTEM              MM/DD/YYYY
                           ALTERNATE IDENTITY

LAST    : SMYTHE                    SUFX :            CIN  : 90008085G
FIRST   : SAMMUEL                   DOB  : 01/01/1960 SSN  : 123-45-6789
MIDDLE  :                           SEX  : M          ALIEN# :

TYPE              IDENTIFIER
COUNTY ID       : 01-30-7000769-1-01

SSN             : 12345678P

DOB             : 08/02/1970
DOB             : 05/02/1980

LAST            : SMITH




                                                        PAGE:  01/01

 F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for ALID:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
TYPE	Indicates the type of identifier by which the individual is known.
IDENTIFIER	The alternate information for the identifier types
PAGE INDICATOR	Displays the current page number vs. the total number of pages.

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County Summary (KSUM)

This screen displays a listing of all counties an individual has been involved with and the individual's status within each county. The information will be displayed in reverse chronological order sorted by active and inactive counties.

```
KSUM                     TRAC INFORMATION SYSTEM              MM/DD/YYYY
                           COUNTY  SUMMARY

LAST   : SMYTHE              SUFX :            CIN   : 90008085G
FIRST  : SAMMUEL             DOB  : 01/01/1960  SSN   : 123-45-6789
MIDDLE :                     SEX  : M          ALIEN# :

SEL     COUNTY #   CONVERTED    COUNTY NAME           STATUS
 _        01          Y         ALAMEDA               INACTIVE
 _        08          N         DEL NORTE             INACTIVE




                    SELECT ONE AND PRESS ENTER            PAGE:  01/01

 F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for KSUM:

Field	*Description*
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
SEL	This is the selection field. The user can see program summary information in a specific county by placing the cursor next to that county and pressing [Enter].
COUNTY #	Number of county of involvement.
CONVERTED	Flag to indicate if the associated county has converted data to the WDTIP database. If the flag is set to "N", it means that data from the county is still being obtained from the MEDS extract file. If the flag is set to "Y", the data used to populate and update the WDTIP database is being received directly from the county/consortia system.

Notes

Notes

Field	Description
COUNTY NAME	Name of county of involvement.
STATUS	Individual's CalWORKs program status in the associated county.

Hands On Exercise:

Practice #1:
Determine what county the selected individual is currently active in. Perform a name search using the name and date of birth provided by the trainer.

Name: _____ **DOB:** _____

1. From the TRAC Main Menu, select County Summary (KSUM) and press [Enter].
2. On IINQ, enter the individual's last name, first name and middle name/initial in the respective fields and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the first name displayed on the list and press [F9] to go to the Individual Detail screen.
5. Press [F9] to go to KSUM.
6. From KSUM determine which county has a status of "active".

Practice #2:
Determine what counties the selected individual has had involvement with. Perform a search on SSN provided by the trainer.

SSN: _____

Program Summary (PSUM)

This screen displays a summary of all program involvement for an individual in the county selected from the County Summary screen (KSUM). The user can then select from the list of programs to view further details about a specific program instance. The sort order is descending chronological with active (open-endated) programs first, then inactive programs.

```
PSUM                         TRAC INFORMATION SYSTEM              MM/DD/YYYY
                               PROGRAM SUMMARY

LAST   : SMYTHE                    SUFX :            CIN  : 90008085G
FIRST  : SAMMUEL                   DOB  : 01/01/1960 SSN  : 123-45-6789
MIDDLE :                           SEX  : M          ALIEN# :

SEL AID CD CNVRTD   COUNTY NAME          PROGRAM    START MONTH END MONTH
 _    30     Y      ALAMEDA              CALWORKS    01/1999     06/1999
 _    35     Y      ALAMEDA              CALWORKS    03/1998     10/1998











                 SELECT ONE AND PRESS ENTER                PAGE:  01/01

 F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for PSUM:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
SEL	This is the selection field. The user can see individual program detail information in a specific program by placing the cursor next to that program instance and pressing [Enter].
AID CODE	A code that indicates what specific program and type of benefits an individual is receiving.

Field	Description
CNVRTD	Flag to indicate if the associated county has converted data to the WDTIP database. If the flag is set to "N", it means that data from the county is still being obtained from the MEDS extract file. If the flag is set to "Y", the data used to populate and update the WDTIP database is being received directly from the county/consortia system.
COUNTY NAME	Name of county of involvement.
PROGRAM	Name of program associated with displayed aid code.
START DATE	The month and year in which the displayed program involvement started.
END DATE	The month and year in which the displayed program involvement ended. (Note: this end date represents a through date. If the end date = 10/99, it means that the individual was active on the associated program through the month of 10/99).

Hands On Exercise:

Practice #1:
Determine the start date of the program the individual was most recently active in. Perform a name search using name and date of birth provided by the trainer.

Name: _____ **DOB:** _____

1. From the TRAC Main Menu, select Program Summary (PSUM) and press [Enter].
2. On IINQ, enter the individual's last name, first name and middle name/initial in the respective fields and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the first name displayed on the list and press [F9] to go to the Individual Detail screen.
5. Press [F9] to go to PSUM.
6. From PSUM select the county with the latest end date.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
California Health & Human
Services Agency Data Center

Practice #2:

Determine the end date of the program in which the individual was most discontinued. Perform a search on the SSN provided by the trainer.

SSN:_____

Notes

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
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Services Agency Data Center

Program Detail (PDET)

This screen displays detailed information about an individual's involvement in a specific program. The information displayed on the left-hand portion of the screen is specific to the program instance selected from the Program Summary screen (PSUM). The information displayed on the right hand portion of the screen is summary time clock data for the selected individual.

```
PDET                    TRAC INFORMATION SYSTEM              MM/DD/YYYY
                           PROGRAM  DETAIL

LAST   : SMYTHE               SUFX :            CIN   : 90008085G
FIRST  : SAMMUEL              DOB  : 01/01/1960  SSN   : 123-45-6789
MIDDLE :                      SEX  : M           ALIEN# :

PROGRAM    : CALWORKS                  TANF 60-MONTHS USED : 17
COUNTY ID  : 01-30-1234567-0-01        CAL 60-MONTHS USED  : 14
AID CODE   : 30                        NON-CAL MONTHS*      : 02
START MONTH : 01/1999                  WTW 18/24-MONTHS USED: 05/18
END MONTH  : 06/1999                   WTW EXTENSION NUMBER : 00/00
DISC. REASON CODE : 060

                                       EXCEPTION INDICATOR
POST-AID CHILD CARE PERIOD              A.SANCTIONS        : N
  BEGIN DATE: 07/01/1999               B.EXEMPTIONS       : Y
  END DATE : 06/30/2001                C.GOOD CAUSE       : N

                                       DIVERSION INDICATOR  : Y


*INCLUDED IN MONTHS USED

F1=HELP F2=IINQ F3=PREV F4=SCRN F5=PREC F6=NREC F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for PDET:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
PROGRAM	Name of program associated with displayed aid code.
COUNTY ID	The case number associated with the specific program selected. Includes the case serial number, the FBU, the person number, county number, and aid code.
AID CODE	A code that indicates what specific program and type of benefits an individual is receiving.
START MONTH	The month and year in which the displayed program involvement started.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
California Health & Human
Services Agency Data Center

Field	Description
END MONTH	The month and year in which the displayed program involvement ended. (Note: this end date represents a through date. If the end date = 10/99, it means that the individual was active on the associated program through the month of 10/99)
DISC. REASON CODE	The specific code detailing the reason for the discontinuance of aid.
POST-AID CHILD CARE PERIOD	The 24-month period immediately following discontinuance from CalWORKs that a former recipient may be potentially eligible to child care benefits.
BEGIN DATE	The beginning of the 24-month post-aid childcare period which will be the first of the month following the month of discontinuance from the CalWORKs program. This date will be computed by the WDTIP system based on the discontinuance date.
END DATE	The begin date of the post-aid childcare period plus 24 months.
TANF 60-MONTHS USED	A cumulative total of the number of months that have counted on the individual's TANF 60-month clock.
CAL 60-MONTHS USED	A cumulative total of the number of months that have counted on the individual's CalWORKs 60-month clock.
NON-CAL MONTHS	Months of non-California program participation that have been included in the time clock calculation(s).
WTW 18/24-MONTHS USED	A cumulative total of the number of months that have counted on the individual's Welfare-to-Work 18/24-month clock.
WTW EXTENSION NUMBER	A number indicating the number of months the WTW time limit has been extended by the county.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
California Health & Human
Services Agency Data Center

Notes

Field	Description
EXCEPTIONS INDICATOR	Flags to indicate if the individual has any sanction, exemption or good cause records in the WDTIP database. If the flag is set to "Y", then a corresponding record has been received. More information about the time clock exceptions is available on the Time Clock Exception Summary and Detail screens (ESUM and EDET).
DIVERSION INDICATOR	Flag to indicate if the individual has any diversion records in the WDTIP database. If the flag is set to "Y", then a diversion payment record exists in the database. More details are available on the Diversion Summary and Detail screens (DSUM and DDET).

Hands On Exercise:

Practice #1:
Determine discontinuance reason code for the program the individual was most recently involved with. Perform a name search using name and date of birth provided by the trainer.

Name: _____ **DOB:** _____

1. From the TRAC Main Menu, select Program Summary (PSUM) and press [Enter].
2. On IINQ, enter the individual's last name, first name and middle name/initial in the respective fields and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the first name and press [Enter] to go to PSUM.
5. From PSUM select the program with the most recent end date by placing the cursor next to that program. Press the [Enter] to go to PDET.
6. On PDET, find the discontinuance reason code.

Practice #2:
Determine the County ID for the program the individual was most recently involved in. Perform a search on the SSN provided by the trainer.

SSN: _____

Time Clock Summary Screen (TSUM)

This screen displays summary information for the three timeclocks that are being calculated and tracked by WDTIP. The screen displays the time clock start date, the time clock end date (if the individual has reached the maximum for the associated time clock), a total of months used, any non-California months that are included in the months used calculation, an extension flag as related to the WTW clock and the number of months the county is extending the WTW clock if applicable.

```
TSUM                   TRAC INFORMATION SYSTEM            MM/DD/YYYY
                         TIME CLOCKS SUMMARY

LAST   : SMYTHE              SUFX :           CIN   : 90008085G
FIRST  : SAMMUEL             DOB  : 01/01/1960 SSN   : 123-45-6789
MIDDLE :                     SEX  : M         ALIEN# :

MONTHS USED INCLUDES NON-CONVERTED DATA: Y


                        TANF 60      CALWORKS 60      WTW 18/24

TIME CLOCK START MONTH  03/1998      03/1998          02/1999
TIME CLOCK END MONTH
MONTHS USED             17           14               05/18
NON-CAL MONTHS*         02           02               N/A
EXTENSION               N/A          N/A              N
EXTENSION MONTHS        N/A          N/A              00/00

LAST CALCULATED DATE : 12/08/1999


*INCLUDED IN MONTHS USED

        F1=HELP F2=IINQ F3=PREV F4=SCRN F11=MEDS F12=TRAC
```

The following table describes the fields for TSUM:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
MONTHS USED INCLUDES NON-CONVERTED DATA	A flag to indicate if the computation of months used includes program participation data from a county or counties that have not converted to the WDTIP system. If this flag is set to "Y", it means that some of the months in the months used calculation are based upon program data that is received in the MEDS extract file and does not include exception information.
TIME CLOCK START MONTH	The month and year in which the individual's specific time clocks were initialized.
TIME CLOCK END MONTH	The month and year when the individual has reached his time clock maximum. This field will be blank until the individual has reached the designated maximum for the specific time clock.
MONTHS USED	A cumulative total of the number of months that have counted on the specific time clock.
NON-CAL MONTHS*	Months of non-California program participation that have been included in the above time clock calculation(s).
EXTENSION	Flag to indicate if the county has extended the individual's 18 month WTW clock.
EXTENSION MONTHS	Number of months of the extension period used over the number of months in the extension period. This will be a numeric figure between 1 and 6 months.
LAST CALCULATED DATE	This is the date in which the time clock calculation was performed on the selected individual.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
California Health & Human
Services Agency Data Center

Hands On Exercise:

Notes

Practice #1:

Determine the number of non-California months that have been included in the TANF time clock calculation. Perform a name search using name and date of birth provided by the trainer.

Name: _____ **DOB:** _____

1. From the TRAC Main Menu, select Time Clock Summary (TSUM) and press [Enter].
2. On IINQ, enter the individual's last name, first name and middle name/initial and DOB in the respective fields and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the first name and press [Enter] to go to TSUM.
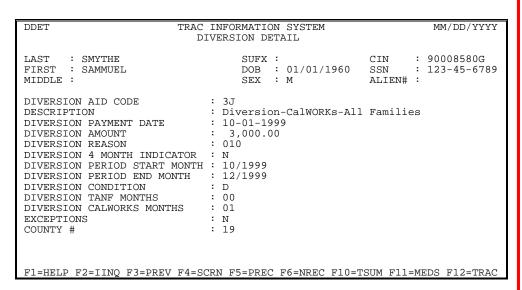5. From TSUM determine the number of non-California months.

Practice #2:

Determine if the WTW 18/24 clock has been initialized. Perform a search on the SSN provided by the trainer.

SSN: _____

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Diversion Summary (DSUM)

This screen displays a summary of diversion payments for an individual and provides the diversion aid code, description of the aid code, the diversion period start month, diversion period end month and the county that issued the diversion payment.

Notes

```
DSUM                      TRAC INFORMATION SYSTEM            MM/DD/YYYY
                            DIVERSION SUMMARY

LAST  : SMYTHE                   SUFX :           CIN   : 790008580G
FIRST : SAMMUEL                  DOB  : 01/01/1960  SSN   : 123-45-6789
MIDDLE :                         SEX  : M          ALIEN# :

SEL AID CODE DESCRIPTION                   START MONTH END MONTH COUNTY#
 _    3J    Diversion-CAlWORKS-All Families  10/1999    12/1999    19










              SELECT ONE AND PRESS ENTER                 PAGE:  01/01

 F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for DSUM:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
SEL	This is the selection field. Place the cursor next to a specific diversion payment and press [Enter] for detailed information about the selected diversion instance.
AID CODE	A code that indicates what specific program and type of benefits an individual is receiving.
DESCRIPTION	Description of the aid code.
START MONTH	Start month of the diversion period. The diversion period is the time period represented by the value of the diversion payment divided by the MAP for the apparently eligible AU at the time of the initial application.

Notes

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
California Health & Human
Services Agency Data Center

Field	Description
END MONTH	End month of the diversion period as calculated above.
COUNTY #	Number of the County that made the diversion payment.

Hands On Exercise:

Practice #1:
Determine the number of diversion payments that have been issued. Perform a name search using name and date of birth provided by the trainer.

Name: _____ **DOB:** _____

1. From the TRAC Main Menu, select Diversion Summary (DSUM) and press [Enter].
2. On IINQ, enter the individual's last name, first name and middle name/initial and DOB in the respective fields and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the first name and press [Enter] to go to DSUM.
5. From DSUM determine the number of diversion payments issued.

Practice #2:
Determine the aid code for the most recent diversion payment issued. Perform a search on the SSN provided by the trainer.

SSN: _____

Diversion Detail (DDET)

This screen displays detailed information about a specific diversion payment as selected from the Diversion Summary screen (DSUM). The information displayed on this screen includes all information necessary to calculate the diversion instance's impact on the TANF and CalWORKs 60-month time clocks.

```
DDET                       TRAC INFORMATION SYSTEM              MM/DD/YYYY
                              DIVERSION DETAIL

LAST   : SMYTHE                 SUFX :              CIN   : 90008580G
FIRST  : SAMMUEL                DOB  : 01/01/1960   SSN   : 123-45-6789
MIDDLE :                        SEX  : M            ALIEN# :

DIVERSION AID CODE          : 3J
DESCRIPTION                 : Diversion-CalWORKs-All Families
DIVERSION PAYMENT DATE      : 10-01-1999
DIVERSION AMOUNT            :  3,000.00
DIVERSION REASON            : 010
DIVERSION 4 MONTH INDICATOR : N
DIVERSION PERIOD START MONTH : 10/1999
DIVERSION PERIOD END MONTH  : 12/1999
DIVERSION CONDITION         : D
DIVERSION TANF MONTHS       : 00
DIVERSION CALWORKS MONTHS   : 01
EXCEPTIONS                  : N
COUNTY #                    : 19



F1=HELP F2=IINQ F3=PREV F4=SCRN F5=PREC F6=NREC F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for DDET:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
DIVERSION AID CODE	A code that indicates what specific program and type of benefits an individual is receiving.
DESCRIPTION	Description of the aid code.

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Notes

Field	Description
DIVERSION PAYMENT DATE	The date the diversion payment was made to the individual. This date is used in the calculation of the TANF time clock as it relates to the diversion payment. NOTE: If an individual receives multiple diversion payments within a 12-month period of time for the same reason, or the diversion payment was intended to cover a need that exceeds four months, the month(s) in which the payment(s) is/are made count on the TANF time clock unless the individual meets applicable TANF exemption criteria.**
DIVERSION AMOUNT	The dollar amount of the diversion payment or service.
DIVERSION REASON	The reason for the diversion payment, for example: Child care, clothing, housing, transportation or other.
DIVERSION 4 MONTH INDICATOR	A flag to indicate if the diversion payment is made to cover a need that exceeds four months.
DIVERSION PERIOD START MONTH	Start month of the diversion period. The diversion period is the time period represented by the value of the diversion payment divided by the MAP for the apparently eligible assistance unit at the time of the initial application.
DIVERSION PERIOD END MONTH	End month of the diversion period as calculated above.

Field	Description
DIVERSION CONDITION	A code used in the calculation of the CalWORKs time clock as related to the diversion payment. • A "D" in this field indicates that the payment is an initial diversion payment. In this situation, the month in which the diversion payment is made counts as a month on the CalWORKs time clock unless the individual meets applicable exception criteria in that month. • An "A" in this field indicates that the individual has reapplied for CalWORKs within the diversion period and has elected to have the months in the diversion period apply to the CalWORKs time clock. In that case, all the months in the diversion period would be added to the time clock unless the individual met applicable exemption criteria in one or all of the months of the diversion period. • An "R" in this field indicates that the individual has reapplied for CalWORKs within the diversion period and has elected to repay the diversion payment. In this situation, none of the months of the diversion period count on the CalWORKs time clock.
DIVERSION TANF MONTHS	The number of months added to the TANF time clock as a result of the specific diversion payment displayed on screen.
DIVERSION CalWORKs MONTHS	The number of months added to the CalWORKs time clock as a result of the specific diversion payment displayed on screen.
EXCEPTIONS	A flag to indicate if the individual met applicable TANF or CalWORKs exception criteria during the diversion period.
COUNTY #	Number of the County that made the diversion payment.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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*** The system determination of the impact of a diversion payment on the TANF and CalWORKs time clock is based on proposed regulations and prior interpretations of those regulations. An ACL detailing final diversion regulations is due out at the end of March 2000. Required changes to system logic will be evaluated and implemented after the release of the ACL.***

Notes

Hands On Exercise:

Practice #1:
Determine the reason code for the most recent diversion payment that has been issued. Perform a search on the SSN provided by the trainer

SSN: _____

1. From the TRAC Main Menu, select Diversion Summary (DSUM) and press [Enter].
2. On IINQ, enter the individual's SSN and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the first name and press [Enter] to go to DSUM.
5. From DSUM select the most recent diversion payment issued by placing the cursor in the "SEL" field and pressing [Enter] to go to the Diversion Detail screen (DDET).
6. On DDET, determine the diversion reason code.

Practice #2:
Determine the diversion condition code for the most recent diversion payment that has been issued. Perform a search on the CIN provided by the trainer

CIN: _____

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Notes

Exception/Extension Summary (ESUM)

This screen displays a summary of all exceptions/extensions for the selected individual. The user can select from a list of exceptions to view further detail about a specific exception. The information displayed in this screen details the reason code for the exception, a description of the reason, the start month of the exception, the end month of the exception and the county who sent the exception record to the WDTIP system.

```
ESUM                      TRAC INFORMATION SYSTEM              MM/DD/YYYY
                    TIME CLOCK EXCEPTION/EXTENSION SUMMARY

LAST   : SMYTHE              SUFX :            CIN   : 90008580G
FIRST  : SAMMUEL             DOB  : 01/01/1960 SSN   : 123-45-6789
MIDDLE :                     SEX  : M          ALIEN# :

SEL REASON   DESCRIPTION                START MONTH  END MONTH   COUNTY #
 _   302     Disabled                     03/1998     04/1998      01













              SELECT ONE AND PRESS ENTER                PAGE:  01/01

 F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for ESUM:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
SEL	This is the selection field. Place the cursor next to a specific exception instance and press [Enter] for detailed information about the selected exception instance.
REASON	A code that indicates the reason for the exception.
DESCRIPTION	Description of the reason for the specific exception.
START MONTH	Month in which the exception started.

Notes

WD Tracking Implementation Project

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
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Field	Description
END MONTH	Month in which the individual no longer meets exception criteria.
COUNTY #	The number of the county that sent the exception record to the WDTIP system.

Hands On Exercise:

Practice #1:
Determine the reason code for the most recent exception criteria.
Perform a search on SSN provided by the trainer.

SSN: _____

1. From the TRAC Main Menu, select Exception Summary (ESUM) and press [Enter].
2. On IINQ, enter the individual's SSN and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the first name and press [Enter] to go to ESUM.
5. From ESUM, determine the exception reason code for the most recent exception period.

Practice #2:
Determine the start month for the most recent exception period.
Perform a search on CIN provided by the trainer.
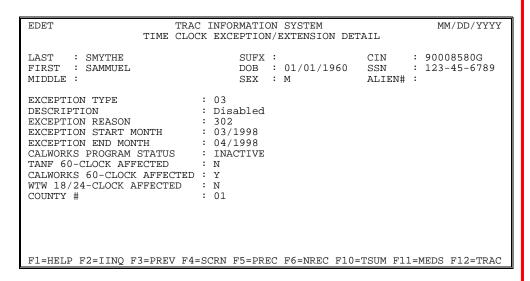
CIN: _____

Exception/Extension Detail (EDET)

This screen displays detailed information about a specific exception/extension instance. Information displayed includes information that details the type of exception, the specific description and reason code, the start and end months of the exception, the individual's current status in the CalWORKs program, and the impact this specific exception had on the three time clocks.

Exceptions are divided into five categories that have different impacts on time clock calculations: Penalties, Sanctions, Exemptions, Good Cause and Excluded Persons.

```
EDET                     TRAC INFORMATION SYSTEM              MM/DD/YYYY
                    TIME CLOCK EXCEPTION/EXTENSION DETAIL

LAST  : SMYTHE               SUFX :           CIN  : 90008580G
FIRST : SAMMUEL              DOB  : 01/01/1960  SSN  : 123-45-6789
MIDDLE :                     SEX  : M          ALIEN# :

EXCEPTION TYPE              : 03
DESCRIPTION                : Disabled
EXCEPTION REASON           : 302
EXCEPTION START MONTH      : 03/1998
EXCEPTION END MONTH        : 04/1998
CALWORKS PROGRAM STATUS    : INACTIVE
TANF 60-CLOCK AFFECTED     : N
CALWORKS 60-CLOCK AFFECTED : Y
WTW 18/24-CLOCK AFFECTED   : N
COUNTY #                   : 01




F1=HELP F2=IINQ F3=PREV F4=SCRN F5=PREC F6=NREC F10=TSUM F11=MEDS F12=TRAC
```

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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The following table describes the fields for EDET:

Field	*Description*
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
EXCEPTION TYPE	A code that indicates the type of time clock exception. Valid values for this field are: 01 = Penalty 02 = Sanction 03 = Exemption 04 = Good Cause 05 = Excluded Person
DESCRIPTION	Description of the reason for the specific exception.
EXCEPTION REASON	A code that indicates the reason for the exception.
EXCEPTION START MONTH	Month in which the exception started.
EXCEPTION END MONTH	Month in which the individual no longer meets exception criteria.
CalWORKs PROGRAM STATUS	The individual's current status in the CalWORKs program. Valid values are ACTIVE or INACTIVE.
TANF 60-CLOCK AFFECTED	Flag to indicate if the TANF time clock was stopped during the exception period due to this exception reason.
CalWORKs 60-CLOCK AFFECTED	Flag to indicate if the CalWORKs 60-month time clock was stopped during the exception period due to this exception reason.
WTW 18/24 CLOCK AFFECTED	Flag to indicate if the WTW 18/24-month time clock was stopped during the exception period due to this exception. reason.
COUNTY #	The number of the county that sent the exception record to the WDTIP system.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
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Services Agency Data Center

Hands On Exercise:

Practice #1:
Determine if the TANF time clock was affected by the most recent exception criteria met. Perform a search on the SSN provided by the trainer.

SSN: _____

1. From the TRAC Main Menu, select Exception Summary (ESUM) and press [Enter].
2. On IINQ, enter the individual's SSN and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the first name and press [Enter] to go to ESUM.
5. From ESUM, select the most recent exception period by placing the cursor in the "SEL" field next to the selected exception instance and pressing [Enter].
6. From EDET, determine if the TANF time clock was affected by the selected exception period.
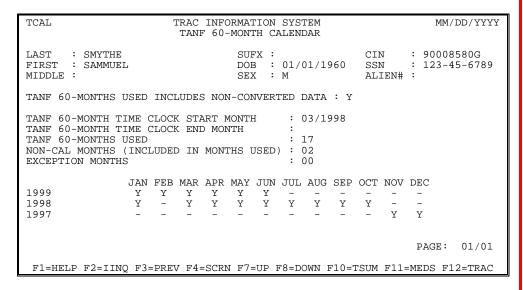
Practice #2:
Determine if the CalWORKs time clock was affected by the most recent exception period. Perform a search on the CIN provided by the trainer.

CIN: _____

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
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Services Agency Data Center

TANF 60-Month Calendar (TCAL)

This screen displays the TANF 60-Month calendar. A single character
will be displayed for each month indicating whether that month is
counted. A "Y" indicates that the month counted on the time clock, an
"E" indicates the month was exempted from the clock, an "N"
indicates that the month did not count on the time clock and a "-"
indicates that no program or participation record was received for the
month (i.e., the individual was not on aid in the month).

```
TCAL                    TRAC INFORMATION SYSTEM              MM/DD/YYYY
                         TANF 60-MONTH CALENDAR

LAST   : SMYTHE              SUFX :            CIN   : 90008580G
FIRST  : SAMMUEL             DOB  : 01/01/1960 SSN   : 123-45-6789
MIDDLE :                     SEX  : M          ALIEN# :

TANF 60-MONTHS USED INCLUDES NON-CONVERTED DATA : Y

TANF 60-MONTH TIME CLOCK START MONTH     : 03/1998
TANF 60-MONTH TIME CLOCK END MONTH       :
TANF 60-MONTHS USED                      : 17
NON-CAL MONTHS (INCLUDED IN MONTHS USED) : 02
EXCEPTION MONTHS                         : 00

           JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
1999        Y   Y   Y   Y   Y   Y   -   -   -   -   -   -
1998        Y   -   Y   Y   Y   Y   Y   Y   Y   Y   -   -
1997        -   -   -   -   -   -   -   -   -   -   Y   Y

                                                 PAGE:  01/01

 F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for TCAL:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
TANF 60-MONTH USED INCLUDES NON-CONVERTED DATA	A flag to indicate if the computation of months used includes program participation data from a county or counties that have not converted to the WDTIP system. If this flag is set to "Y", it means that some of the months in the months used calculation are based upon program data that is received in the MEDS extract file and does not include exception information.
TANF 60-MONTH TIME CLOCK START MONTH	The month and year in which the individual's TANF time clock was initialized.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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Services Agency Data Center

Field	Description
TANF 60-MONTH CLOCK END MONTH	The month and year when the individual has reached his TANF time clock maximum. This field will be blank until the individual has reached the TANF 60-month time limit.
TANF 60-MONTHS USED	A cumulative total of the number of months that have counted on the TANF time clock.
NON-CAL MONTHS (INCLUDED IN MONTHS USED)	Months of non-California program participation that has been included in the TANF time clock calculation(s).
EXCEPTION MONTHS	Total number of months that have been exempted from the TANF time clock. NOTE: an exempted month means that the month does not count against the specific time limit.
CALENDAR	A calendar format displaying the months and years covered by the individual's TANF time clock. The code associated with the particular month indicates if the month counted on the TANF clock. Valid values include: Y = month counted E = month was exempted N= month did not count (other than exemption) – = no program participation record received in the month

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<u>**Hands On Exercise:**</u>

Practice #1:
Determine the TANF time clock status in the month of 7/99. Perform a name search name and date of birth provided by the trainer.

Name:_____ **DOB:** _____

1. From the TRAC Main Menu, select TANF 60-Month Calendar (TCAL) and press [Enter].
2. On IINQ, enter the individual's last name, first name and middle name/initial and DOB in the respective fields and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the first name and press [Enter] to go to TCAL.
5. From TCAL, determine the TANF time clock status in the month of 7/98 by the code in calendar.

Practice #2:
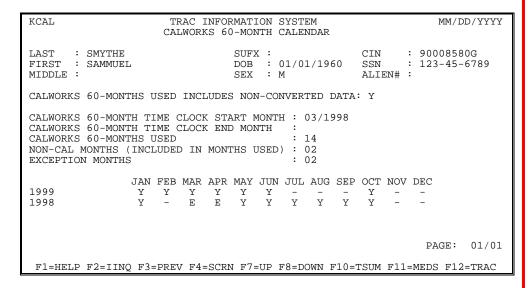*Determine the total number of months exempted from the TANF time clock. Perform a search on the SSN provided by the trainer.*

SSN:_____

CalWORKs 60-Month Calendar (KCAL)

This screen displays the CalWORKS 60-Month calendar. A single character will be displayed for each month indicating whether that month is counted. A "Y" indicates that the month counted on the time clock, an "E" indicates the month was exempted from the clock, an "N" indicates that the month did not count on the time clock, and a "-" indicates that no program or participation record was received for the month (i.e., the individual was not on aid in the month).

```
KCAL                  TRAC INFORMATION SYSTEM              MM/DD/YYYY
                     CALWORKS 60-MONTH CALENDAR

LAST   : SMYTHE               SUFX :            CIN   : 90008580G
FIRST  : SAMMUEL              DOB  : 01/01/1960 SSN   : 123-45-6789
MIDDLE :                      SEX  : M          ALIEN# :

CALWORKS 60-MONTHS USED INCLUDES NON-CONVERTED DATA: Y

CALWORKS 60-MONTH TIME CLOCK START MONTH : 03/1998
CALWORKS 60-MONTH TIME CLOCK END MONTH   :
CALWORKS 60-MONTHS USED                  : 14
NON-CAL MONTHS (INCLUDED IN MONTHS USED) : 02
EXCEPTION MONTHS                         : 02


         JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
1999      Y   Y   Y   Y   Y   Y   -   -   -   Y   -   -
1998      Y   -   E   E   Y   Y   Y   Y   Y   Y   -   -




                                               PAGE:  01/01

 F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for KCAL:

Field	*Description*
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
CalWORKs 60-MONTH USED INCLUDES NON-CONVERTED DATA	A flag to indicate if the computation of months used includes program participation data from a county or counties that have not converted to the WDTIP system. If this flag is set to "Y", it means that some of the months in the months used calculation are based upon program data that is received in the MEDS extract file and does not include exception information.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
California Health & Human
Services Agency Data Center

Notes

Field	Description
CalWORKs 60-MONTH TIME CLOCK START MONTH	The month and year in which the individual's CalWORKs time clock was initialized.
CalWORKs 60-MONTH CLOCK END MONTH	The month and year when the individual has reached his CalWORKs time clock maximum. This field will be blank until the individual has reached the CalWORKs 60-month time limit.
CalWORKs 60-MONTHS USED	A cumulative total of the number of months that have counted on the CalWORKs time clock.
NON-CAL MONTHS (INCLUDED IN MONTHS USED)	Months of non-California program participation that has been included in the CalWORKs time clock calculation(s).
EXCEPTION MONTHS	Total number of months that have been exempted from the CalWORKs time clock.
CALENDAR	A calendar format displaying the months and years covered by the individual's CalWORKs time clock. The code associated with the particular month indicates if the month counted on the CalWORKs 60-month time clock. Valid values include: Y = month counted E = month was exempted N = month did not count (other than exemption) – = no program participation record received in the month

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Notes

Hands On Exercise:

Practice #1:
Determine the CalWORKs time clock status in the month of 07/1998. Perform a name search using the name and date of birth provided by the trainer.

    Name:_____ DOB: _____

1. From the TRAC Main Menu, select CalWORKs 60-Month Calendar (KCAL) and press [Enter].
2. On IINQ, enter the individual's last name, first name and middle name/initial and DOB in the respective fields and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor in the "SEL" field next to the first name and press [Enter] to go to KCAL.
5. From KCAL, determine the TANF time clock status in the month of 07/1998 by the code in calendar.

Practice #2:
Determine the total number of months exempted from the CalWORKs time cloc.. Perform a search on the SSN provided by the trainer.

    SSN:_____

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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WTW 18/24-Month Calendar (WCAL)

This screen displays the Welfare to Work (WTW) 18/24-Month calendar. A single character will be displayed for each month indicating whether that month is counted. A "Y" indicates that the month counted on the time clock, an "E" indicates the month was exempted from the clock, an "N" indicates that the month did not count on the time clock, and a "-" indicates that no program or participation record was received for the month (i.e., the individual was not on aid in the month).

```
WCAL                      TRAC INFORMATION SYSTEM                 MM/DD/YYYY
                          WTW 18/24-MONTH CALENDAR

LAST   : SMYTHE               SUFX :            CIN    : 90008580G
FIRST  : SAMMUEL              DOB  : 01/01/1960 SSN    : 123-45-6789
MIDDLE :                      SEX  : M          ALIEN# :

WORKPLAN SIGN/REFUSAL DATE                 : 02/16/1999
COUNTY OF RECORD                           : 01
WTW 18/24-MONTH TIME CLOCK START MONTH     : 02/1999
WTW 18/24-MONTH TIME CLOCK END MONTH       :
WTW 18/24-MONTHS USED                      : 05/18
EXCEPTION MONTHS                           : 00
EXTENSION MONTHS                           : 00/00

            JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
1999         -   Y   Y   Y   Y   Y   -   -   -   -   -   -




                                                          PAGE 01/01

 F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for WCAL:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
WORKPLAN SIGN/REFUSAL DATE	The date the individual signed or refused to sign the Welfare to Work Plan. Format for this field will be MM/DD/YYYY. This date initializes the WTW 18/24-month time clock.
COUNTY OF RECORD	The number of the county that sent the workplan sign date record to the WDTIP system.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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Field	Description
WTW 18/24-MONTH TIME CLOCK START MONTH	The month and year in which the individual's WTW time clock was initialized.
WTW 18/24-MONTH CLOCK END MONTH	The month and year when the individual has reached his WTW time clock maximum. This field will be blank until the individual has reached the WTW 18 or 24-month time limit.
WTW 18/24 MONTHS USED	A cumulative total of the number of months that have counted on the WTW time clock. This will be displayed as the number of months used over the number of months initially available (18 for an applicant; 24 for a recipient).
EXCEPTION MONTHS	Total number of months that have been exempted from the WTW 18/24-month time clock. NOTE: an exempted month means that the month does not count against the specific time limit.
EXTENSION MONTHS	Number of months of the extension period used over the number of months in the extension period. This will be a numeric figure between one and six months.
CALENDAR	A calendar format displaying the months and years covered by the individual's WTW time clock. The code associated with the particular month indicates if the month counted on the WTW 18/24-month time clock. Valid values include: Y = month counted E = month was exempted N = month did not count (other than exemption) – = no program participation record received in the month

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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Hands On Exercise:

Practice #1:
Determine the Welfare to Work plan sign date. Perform a search on SSN provided by the trainer.

SSN: _____

1. From the TRAC Main Menu, select WTW 18/24-Month Calendar (WCAL) and press [Enter].
2. On IINQ, enter the individual's SSN and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the first name and press [Enter] to go to WCAL.
5. From WCAL, determine the workplan sign date.

Practice #1:
Determine the county of record for the workplan sign/refusal date. Perform a search on the CIN provided by the trainer.

CIN: _____

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Training Curriculum – System Functionality
Participant Guide – Section 2

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Update Screens Review

Access

The four updateable screens in the WDTIP system allow selected users to perform on-line entry and updating of specific transaction types. The design of these update screens is to allow counties to provide mandatory time clock data to the WDTIP system if it is not captured in their current eligibility systems, and are therefore not able to send the data through the normal daily batch processes. Each county is authorized a specific set of update transactions. A county may have update access to any, all, or none of the update screens depending on what information they are able to send through their eligibility system in the batch process.

Users who update capability in MEDS will have update capability in the WDTIP system. For the purposes of the WDTIP system, update capability in MEDS is defined as having EW 20, FX 20 or AP 20 capability. Users who have inquiry only access in MEDS will also have inquiry only access in WDTIP and will be able to only view the data on the four update screens.

Authorized users of the WDTIP update screens may only update data that is owned by their respective county. When a record is requested for update, the County ID of the user (carried forward from the initial MEDS logon) is compared against the last updated user's County ID in the WDTIP database. If a match is found, the requesting user can update the record.

Functionality

All four of the update screens follow the same convention. The update screens are divided into the upper and lower portions of the screen. The upper half of the screen is used to modify or delete existing records. The lower portion of the screen is used to add new records for an individual.

The upper portion of the screen will display all of the individual's records that are in the database for that particular screen and will be utilized to modify or delete a selected record. To modify a record, the user puts a "M" in the SEL field by the record the user wishes to affect. The user then presses [Enter], which unprotects the fields that can be edited. The user then changes the fields as necessary and again presses [Enter]. A warning message is displayed asking if the user wants to modify the record. If the user answers "Y" and presses [enter], the record is immediately updated in the database as well as on

screen. If the user answers "N", the information is discarded and not updated to either the database or the screen. The logic program to apply the changes to the associated time clocks does not run until the batch process executes.

It is important to note that only the county that owns the record can modify or delete that particular record.

To delete a selected record, the user puts a "D" in the SEL field by the record the user wishes to affect and presses [Enter]. A warning message is displayed asking if the user wants to delete the record. If the user answers 'Y" and presses [Enter], the record is immediately deleted from the database as well as on screen. The logic program to apply the changes to the associated time clocks does not run until the batch process executes. Again, only the county that owns the record can delete that particular record.

The bottom portion of the screen will be used to add new records for the individual. To add a record, the user puts an "A" in the SEL field and presses [Enter], which unprotects the entry fields. The user enters the required information in the appropriate fields and presses [Enter]. A warning message is displayed asking if the user wants to add the record. If the user answers "Y" and presses [Enter], the record is immediately added to the database as well updated to the top portion of the screen. The logic program to apply the added record to the associated time clocks does not run until the batch process executes. A new record can be added at any time, but will be edited if the time period of a new record overlaps with an already existing record.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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Non-California Participation Update (UNCP)

This screen allows for the inquiry and on-line updating of non-California program participation. Information regarding the State and months in which aid was received is recorded and displayed.

```
UNCP                    TRAC INFORMATION SYSTEM              MM/DD/YYYY
                       NON-CAL PARTICIPATION UPDATE

LAST   : SMYTHE               SUFX :            CIN   : 90008580G
FIRST  : SAMMUEL              DOB  : 01/01/1960  SSN   : 123-45-6789
MIDDLE :                      SEX  : M           ALIEN# :

SELECT A RECORD TO MODIFY OR DELETE (M/D):
   SEL   COUNTY #   STATE    START MONTH    END MONTH
    _      01        WY      11 / 1997      12 / 1997




*****************************************************************************
ADD A NEW RECORD (A):
   SEL             STATE    START MONTH    END MONTH
    _              __       __ / ____      __ / ____

                                                           PAGE: 01/01

 F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for UNCP:

Field	*Description*
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
SEL	This is the selection field. User will enter an A, M, or D depending on the action they wish to take.
COUNTY #	Number of the county that owns the record. This is system generated based on MEDS sign on of the user who originally entered the record.
STATE	State in which individual received assistance.
START MONTH	The month and year in which the non-California program involvement started.
END MONTH	The month and year in which the non-California program involvement ended.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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Hands On Exercise:

Practice #1:
Add non-California participation information as follows for the SSN provided by the trainer. Aid received in Oregon from 12/1999 through 02/2000.

SSN: _____

1. From the TRAC Main Menu, select Non-California Participation Update (UNCP) and press [Enter].
2. On IINQ, enter the listed SSN and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the matching record and press [Enter] to go to UNCP.
5. On the bottom portion of UNCP, enter an "A" in the SEL field and press [Enter] to unprotect the entry fields.
6. Enter the postal abbreviation for the state of Oregon, the start and end months and press [Enter].
7. The system will display the message ADD RECORD (Y/N)? If the information is entered correctly, enter a "Y" *and press [Enter].*
8. The entered information will update to the upper portion of the screen and to the TRAC database immediately.
9. **The time clock logic will not update the individual's timeclocks until it is run in the evening's batch process.**

Practice #2:
Update non-California participation information entered in Practice #1. You discovered that aid was received in Oregon from **10/1999** *(not 12/1999) through 02/2000.*

1. From the TRAC Main Menu, select Non-California Participation Update (UNCP) and press [Enter].
2. On IINQ, enter the listed SSN and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the matching record and press [Enter] to go to UNCP.
5. On the upper portion of UNCP, enter an "M" in the SEL field by the record you wish to update (in this case the Oregon record) and press [Enter].
6. The system will unprotect the STATE, START MONTH and END MONTH fields so you can edit the appropriate fields.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
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7. Change the start month from 12/1999 to 10/1999 and press [Enter].

8. The system will display the message MODIFY RECORD (Y/N)? If the information is entered correctly, enter a "Y" **and press [Enter].**

9. The entered information will update the record and the WDTIP database immediately.

10. **The time clock logic will not update the individual's timeclocks until it is run in the evening's batch process.**
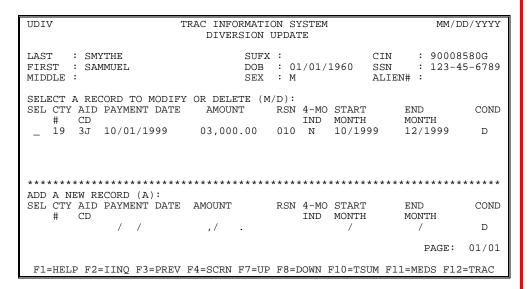
Practice #3:

Delete non-California participation information entered in Practice #1 and modified in practice #2. You discovered that the individual did not receive aid in Oregon.

1. From the TRAC Main Menu, select Non-California Participation Update (UNCP) and press [Enter].

2. On IINQ, enter the listed SSN and press [Enter].

3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).

4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the matching record and press [Enter] to go to UNCP.

5. On the upper portion of UNCP, enter a "D" in the SEL field by the record you wish to update (in this case the Oregon record) and press [Enter].

6. The system will display the message DELETE RECORD (Y/N)? Enter a "Y" **and press [Enter].**

7. The selected record will be deleted from the screen and the WDTIP database immediately.

8. **The time clock logic will not update the individual's timeclocks until it is run in the evening's batch process**.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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Diversion Update (UDIV)

This screen allows for the inquiry and on-line updating of Diversion payment information. Information entered on screen is required for the accurate calculation and tracking of the TANF and CalWORKs 60-month timeclocks.

```
UDIV                    TRAC INFORMATION SYSTEM              MM/DD/YYYY
                           DIVERSION UPDATE

LAST  : SMYTHE                  SUFX :            CIN   : 90008580G
FIRST : SAMMUEL                 DOB  : 01/01/1960  SSN   : 123-45-6789
MIDDLE :                        SEX  : M           ALIEN# :

SELECT A RECORD TO MODIFY OR DELETE (M/D):
SEL CTY AID PAYMENT DATE     AMOUNT      RSN 4-MO START       END       COND
    #   CD                              IND MONTH       MONTH
 _  19  3J  10/01/1999     03,000.00    010  N  10/1999     12/1999      D




****************************************************************************
ADD A NEW RECORD (A):
SEL CTY AID PAYMENT DATE   AMOUNT        RSN 4-MO START       END       COND
    #   CD                              IND MONTH       MONTH
            /  /           ,/   .              /           /             D

                                                         PAGE:  01/01

 F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

The following describes the fields for UDIV:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
SEL	This is the selection field. User will enter an A, M, or D depending on the action they wish to take.
CTY #	Number of the county that made the diversion payment.
AID CD	A code that indicates what specific program and type of benefits an individual is receiving.
PAYMENT DATE	The date the diversion payment was made to the individual. This date is used in the calculation of the TANF time clock as it relates to the diversion payment.
AMOUNT	The dollar amount of the diversion payment or service.

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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Field	Description
RSN	The reason for the diversion payment, for example: Child care, clothing, housing, transportation or other.
4-MO IND	A flag to indicate if the diversion payment is made to cover a need that exceeds four months.
START MONTH	Start month of the diversion period. The diversion period is the time period represented by the value of the diversion payment divided by the MAP for the apparently eligible assistance unit at the time of the initial application.
END MONTH	End month of the diversion period as calculated above.
COND	A code used in the calculation of the CalWORKs time clock as related to the diversion payment. A "D" in this field indicates that the selected diversion payment is an initial diversion payment.

An "A" in this filed indicates that the individual has reapplied for CalWORKs within the diversion period and has elected to have the months in the diversion period count on the CalWORKs time clock.

An "R" in this field indicates that the individual has reapplied for CalWORKs within the diversion period and has elected to repay the diversion payment. In this situation, none of the months of the diversion period count on the CalWORKs time clock. |

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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Hands On Exercise:

Practice #1:
Add Diversion payment record for SSN provided by the trainer.
Aid Code = 3J
Payment Date = 03/01/2000
Amount =$1500.00
Reason = Housing
4 Month Indicator = No
Diversion period start month = 03/2000
Diversion period end month = 05/2000

SSN: _____

1. From the TRAC Main Menu, select Diversion Update (UDIV) and press [Enter].
2. On IINQ, enter the listed SSN and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the matching record and press [Enter] to go to UDIV.
5. On the bottom portion of DIV, enter an "A" in the SEL field and press [Enter] to unprotect the entry fields.
6. Enter the above diversion payment information and press [Enter].
7. The system will display the message ADD RECORD (Y/N)? If the information is entered correctly, enter a "Y" *and press [Enter].*
8. The entered information will update to the upper portion of the screen and to the WDTIP database immediately.
9. The entered information will also populate Diversion Summary (DSUM) and Diversion Detail (DDET) immediately as well as change the Diversion Flag on the Individual Identity (IDET) and Program Detail (PDET).
10. Press [Home] to move the cursor to the Screen ID field. Type DSUM and press [Enter].
11. DSUM will be displayed with the entered diversion payment information added.
12. Using the [Tab] key, move the cursor to the SEL field next to the diversion information just added and press [Enter].
13. DDET will display the detailed diversion payment information.
14. **The time clock logic will not update the individual's timeclocks until it is run in the evening's batch process.**

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
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Services Agency Data Center

Practice #2:

Update Diversion payment information entered in Practice #1. You discovered that the diversion payment was for $1800 and the diversion period end month should be 06/2000.

1. From the TRAC Main Menu, select Diversion Update (UDIV) and press [Enter].
2. On IINQ, enter the listed SSN and press [Enter].
3. The system will display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the matching record and press [Enter] to go to UDIV.
5. On the upper portion of UDIV, enter an "M" in the SEL field by the record you wish to update and press [Enter].
6. The system will unprotect the fields so you can edit the appropriate fields.
7. Change the AMOUNT from $1500 to $1800 and the END MONTH from 05/2000 to 06/2000 and press [Enter].
8. The system will display the message MODIFY RECORD (Y/N)? Enter a "Y" ***and press [Enter].***
9. The entered information will update the record and the WDTIP database and system display immediately.
10. **The time clock logic will not update the individual's timeclocks until it is run in the evening's batch process.**

Practice #3:

Delete the Diversion payment information entered in Practice #1 and modified in practice #2. You discovered that the diversion check was returned to the department uncashed.
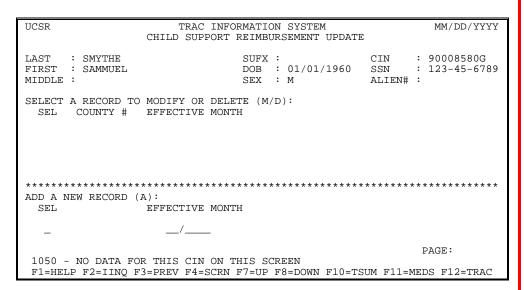
1. From the TRAC Main Menu, select Diversion Update (UDIV) and press [Enter].
2. On IINQ, enter the listed SSN and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the matching record and press [Enter] to go to UDIV.
5. On the upper portion of UDIV enter a "D" in the SEL field by the record you wish to update and press [Enter].
6. The system will display the message DELETE RECORD (Y/N)? Enter a "Y" ***and press [Enter].***
7. The selected record will be deleted from the screen and the WDTIP database and system display immediately.
8. **The time clock logic will not update the individual's timeclocks until it is run in the evening's batch process.**

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Child Support Update (UCSR)

Notes

This screen allows for the inquiry and on-line updating of circumstances when the collection of child support fully reimburses that aid payment made in the month. When this occurs, the month is considered exempt and does not count toward the CalWORKs 60-month time limit.

```
UCSR                     TRAC INFORMATION SYSTEM              MM/DD/YYYY
                    CHILD SUPPORT REIMBURSEMENT UPDATE

LAST  : SMYTHE                 SUFX :            CIN   : 90008580G
FIRST : SAMMUEL                DOB  : 01/01/1960 SSN   : 123-45-6789
MIDDLE :                       SEX  : M          ALIEN# :

SELECT A RECORD TO MODIFY OR DELETE (M/D):
  SEL    COUNTY #   EFFECTIVE MONTH




*****************************************************************************
ADD A NEW RECORD (A):
  SEL             EFFECTIVE MONTH

  _                  ___/____

                                                         PAGE:
 1050 - NO DATA FOR THIS CIN ON THIS SCREEN
 F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for UCSR:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
SEL	This is the selection field. User will enter an A, M, or D depending on the action they wish to take.
COUNTY #	Number of the county that entered the child support reimbursement record.
EFFECTIVE MONTH	Month which is exempted form the CalWORKs 60-month time clock when the amount of aid is reimbursed by child support collected whether collected in that month or a subsequent month.

Hands On Exercise:

Notes

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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Practice #1:
Add Child Support Reimbursement record for the month of 09/1999 for SSN provided by the trainer.

SSN: _____

1. From the TRAC Main Menu, select Child Support Reimbursement Update (UCSR) and press [Enter].
2. On IINQ, enter the listed SSN and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the matching record and press [Enter] to go to UCSR.
5. On the bottom portion of UCSR, enter an "A" in the SEL field and press [Enter] to unprotect the entry fields.
6. Enter the effective month and press [Enter].
7. The system will display the message ADD RECORD (Y/N)? If the information is entered correctly, enter a "Y" *and press [Enter].*
8. The entered information will update to the upper portion of the screen and to the WDTIP database immediately.
9. The entered information will also immediately populate and display on Exception Summary (ESUM) and Exception Detail (EDET).
10. Press [Home] to move the cursor to the Screen ID field, type ESUM and press [Enter].
11. Exception Summary will display and be populated with the information entered on USSO.
12. Using the [Tab] key, place the cursor in the SEL field next to the child support reimbursement exception record and press [Enter].
13. Exception Detail (EDET) will display the detailed information regarding the child support reimbursement exception.
14. **The time clock logic will not update the individual's time clocks until it is run in the evening's batch process.**

Practice #2:
Update Child Support Reimbursement information entered in Practice #1. You discovered that the Child Support Reimbursement was for the month of 08/1999.

1. From the TRAC Main Menu, select Child Support Reimbursement Update (UCSR) and press [Enter].
2. On IINQ, enter the listed SSN and press [Enter].
3. The system will display matches on the Individual Response Summary screen (ISUM).

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

HHSDC
California Health & Human
Services Agency Data Center

4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the matching record and press [Enter] to go to UCSR.
5. On the upper portion of UCSR, enter an "M" in the SEL field by the record you wish to update and press [Enter].
6. The system will unprotect the fields so you can edit the appropriate fields.
7. Change the EFFECTIVE DATE from 09/1999 to 08/1999 and press [Enter].
8. The system will display the message MODIFY RECORD (Y/N)? If the information is entered correctly, enter a "Y" ***and press [Enter].***
9. The entered information will update the record and the WDTIP database and system display immediately.
10. **The time clock logic will not update the individual's timeclocks until it is run in the evening's batch process.**
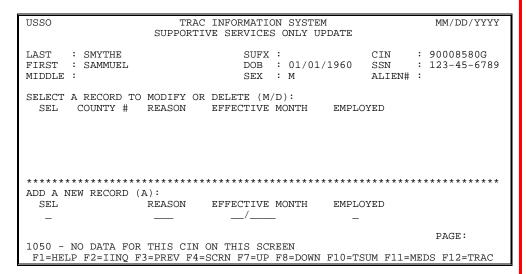
Practice #3:

Delete the Child Support Reimbursement information entered in Practice #1 and modified in practice #2. You discovered that the Child Support Reimbursement was for another client.

1. From the TRAC Main Menu, select Child Support Reimbursement Update (UCSR) and press [Enter].
2. On IINQ, enter the listed SSN and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the matching record and press [Enter] to go to UCSR.
5. On the upper portion of UCSR enter a "D" in the SEL field by the record you wish to update and press [Enter].
6. The system will display the message DELETE RECORD (Y/N)? Enter a "Y" ***and press [Enter].***
7. The selected record will be deleted from the screen and the WDTIP database and system display immediately.
8. **The time clock logic will not update the individual's timeclocks until it is run in the evening's batch process.**

Supportive Services Only Update (USSO)

This screen allows for the inquiry and on-line updating of situations where an individual receives a supportive services only payment (no corresponding aid payment). Supportive services are considered assistance for the purposes of the TANF 60-month time limit if provided to families who are **not** employed.

```
USSO                    TRAC INFORMATION SYSTEM              MM/DD/YYYY
                     SUPPORTIVE SERVICES ONLY UPDATE

LAST   : SMYTHE               SUFX :            CIN   : 90008580G
FIRST  : SAMMUEL              DOB  : 01/01/1960 SSN   : 123-45-6789
MIDDLE :                      SEX  : M          ALIEN# :

SELECT A RECORD TO MODIFY OR DELETE (M/D):
  SEL    COUNTY #   REASON    EFFECTIVE MONTH    EMPLOYED




*****************************************************************************
ADD A NEW RECORD (A):
  SEL             REASON    EFFECTIVE MONTH    EMPLOYED
  _               ____        __/____              _
                                                   PAGE:
1050 - NO DATA FOR THIS CIN ON THIS SCREEN
 F1=HELP F2=IINQ F3=PREV F4=SCRN F7=UP F8=DOWN F10=TSUM F11=MEDS F12=TRAC
```

The following table describes the fields for USSO:

Field	Description
HEADER	Information displayed in the header section of the screen is the demographic information linked in the Statewide Client Index to the individual selected on the Individual Response Summary screen (ISUM).
SEL	This is the selection field. User will enter an A, M, or D depending on the action they wish to take.
COUNTY #	Number of the county that entered the child support reimbursement record.
REASON	The type of supportive service payment received by the individual (transportation, child care or ancillary).
EFFECTIVE MONTH	The month in which the individual received the supportive services only payment.

Field	Description
EMPLOYED	Y/N flag to indicate if the individual is employed. If the individual is not employed the month will count on the TANF 60-month time clock.

Hands On Exercise:

Practice #1:
Add a Support Services Only record for SSN provided by the trainer.
Reason = Transportation
Effective Month = 10/1999
Employed = N

> **SSN:** _____

1. From the TRAC Main Menu, select Supportive Services Only Update (USSO) and press [Enter].
2. On IINQ, enter the listed SSN and press [Enter].
3. The system will search the SCI database and display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the matching record and press [Enter] to go to USSO.
5. On the bottom portion of USSO, enter an "A" in the SEL field and press [Enter] to unprotect the entry fields.
6. Enter the reason code for transportation, the effective month and enter "N" in the employed field. Press [Enter].
7. The system will display the message ADD RECORD (Y/N)? If the information is entered correctly, enter a "Y" *and press [Enter].*
8. The entered information will update to the upper portion of the screen and to the WDTIP database immediately.
9. **The time clock logic will not update the individual's timeclocks until it is run in the evening's batch process.**

Practice #2:
Update the Supportive Services Only record entered in Practice #1. You discovered that the individual was employed in the month of 10/1999.
1. From the TRAC Main Menu, select Supportive Services Only Update (USSO) and press [Enter].
2. On IINQ, enter the listed SSN and press [Enter].
3. The system will display matches on the Individual Response Summary screen (ISUM).

4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the matching record and press [Enter] to go to USSO.
5. On the upper portion of USSO enter an "M" in the SEL field by the record you wish to update and press [Enter].
6. The system will unprotect the fields so you can edit the appropriate fields.
7. Change the EMPLOYED field from "N" to "Y" and press [Enter].
8. The system will display the message MODIFY RECORD (Y/N)? If the information is entered correctly, enter a "Y" *and press [Enter].*
9. The entered information will update the record and the WDTIP database immediately.
10. **The time clock logic will not update the individual's timeclocks until it is run in the evening's batch process.**

Practice #3:
Delete the Supportive Services Only record entered in Practice #1 and modified in practice #2. You discovered that the check issued to the individual for transportation reimbursement was returned to the department uncashed.
1. From the TRAC Main Menu, select Supportive Services Only Update (USSO) and press [Enter].
2. On IINQ, enter the listed SSN and press [Enter].
3. The system will display matches on the Individual Response Summary screen (ISUM).
4. On ISUM, place the cursor (using the tab key to navigate) in the "SEL" field next to the matching record and press [Enter] to go to USSO.
5. On the upper portion of USSO enter an "D" in the SEL field by the record you wish to update and press [Enter].
6. The system will display the message DELETE RECORD (Y/N)? Enter a "Y" *and press [Enter].*
7. The selected record will be deleted from the screen and the WDTIP database immediately.
8. **The time clock logic will not update the individual's timeclocks until it is run in the evening's batch process.**

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 2

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Final System Practice Scenario

Answer the following questions regarding the individual provided by trainer:

SSN: _____

#	Question	Answer
1	What is the individual's name and DOB?	
2	What state was this individual born in?	
3	What other SSN's has this individual been known by?	
4	What county is this individual currently active in?	
5	In the county the individual is currently active in, what is their most recent aid code involvement?	
6	What is the county id of the most recent program involvement?	
7	How many months has this individual used on the TANF time clock?	
8	Has this individual received any diversion payments in the last 12 months and if so, for what reason(s)?	
9	Has this individual met any exception criteria? If so, what is the start month of the most current exception instance?	
10	Did the TANF 60-month time clock tick for the month of January 1999? What about the CalWORKs 60-month time clock? The WTW 18/24-month time clock?	
11	Does this individual have any non-California participation recorded in the WDTIP system?	
12	What month has been excepted from the CalWORKs 60-month clock due to the collection of child support reimbursing the aid payment for the month?	

Welfare Data Tracking Implementation Project
Training Curriculum – System Functionality
Participant Guide – Section 3

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Section 3 – WDTIP Reports

Report Generation

WDTIP will generate four electronic files each month containing time clock related data elements that can me formatted by the counties for reporting purposes. Client identifier information such as CIN and/or County ID will be standard in all report files. These electronic files will be stored on the California Health and Human Services Agency Data Center (HHSDC) mainframe for three months before being overwritten with new data.

The following report data files will be generated on a monthly basis for each county:

Approaching Time Limits

This report produces a summary and detailed list of active individuals who are within a predetermined time period of the TANF and CalWORKs 60-month time limits and the WTW 18/24-month time limit.

Active individuals who are within two and six months of the TANF and CalWORKs 60-month time limit will be included in this report. Active individuals who are within three months of their 18 or 24 month WTW time limit will also be reported.

This data can be used by the counties to generate caseload management reports to help ensure that upcoming time-on-aid limits are properly managed.

Exceeding Time Limits

This report produces a summary and detailed list of active individuals who have exceeded the TANF and/or CalWORKs 60-month time limits and/or the WTW 18/24-month time limit.

This report will list individuals who have exceeded the TANF and/or CalWORKs 60-month time limit as well as those individuals who have exceeded the WTW 18 or 24-month time limit.
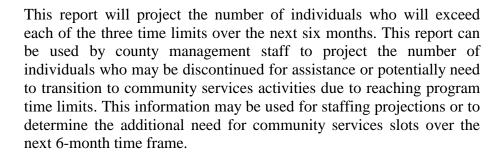
This data can be used by the counties to generate caseload management reports to help ensure that individuals who have exceeded time-on-aid limits meet extender criteria or are appropriately notified and the case handled as per regulations and county policy.

Monthly Projection

This report produces monthly projections of the number of active individuals who will exceed the TANF and CalWORKs 60-month time limits and the WTW 18/24-month time limits.

This report will project the number of individuals who will exceed each of the three time limits over the next six months. This report can be used by county management staff to project the number of individuals who may be discontinued for assistance or potentially need to transition to community services activities due to reaching program time limits. This information may be used for staffing projections or to determine the additional need for community services slots over the next 6-month time frame.

Multiple County Involvement

This report will detail the number of individuals with CalWORKs program participation involvement in multiple counties over time beginning 1/1/1998. A total number for each county will be reported as well as the total number for all counties. This report is generated to determine what percentage of the CalWORKs population receives assistance across county lines.